DOCUMENT RESUME

ED 136 762 IR 004 546

AUTHOR	Washtien, Joe
TITLE	A Guide for Planning and Teaching Continuing Education Courses. Working Paper No. 2.
INSTITUTION	Medical Library Association, Chicago, Ill.
SPONS AGENCY	National Library of Medicine (DHEW), Bethesda, Md.
PUB DATE	75
GRANT	NIH-5-R01-LM-01857-02
NOTE	68p.; For related documents, see IR 004 545-549
EDRS PRICE	MF-$0.83 HC-$3.50 Plus Postage.
DESCRIPTORS	*Adult Education; Educational Objectives; *Educational Planning; Evaluation; *Guidelines; *Instruction; Instructional Aids; Learning; Learning Activities; *Teaching Methods; *Teaching Techniques

ABSTRACT

This report sponsored by the Medical Library Association makes recommendations on the planning and teaching of continuing education courses. Included are discussions of ways to determine the scope and objectives of a course, gear a course towards a target population, and limit a course in scope so as to include all material within a limited time period. Designing learning activities with special consideration for the importance of teacher and learner participation, and individualized instruction are also examined. A variety of instructional methods and techniques are presented as well as ways of evaluating instruction to determine whether course objectives have been met. (AP)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED136762

MEDICAL LIBRARY ASSOCIATION
919 N. Michigan Ave., Chicago, IL 60611

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

A GUIDE FOR PLANNING AND TEACHING CONTINUING EDUCATION COURSES

Joe Washtien

1975

PERMISSION TO REPRODUCE THIS COPYRIGHTED MATERIAL HAS BEEN GRANTED BY
Julie Blume

TO ERIC AND ORGANIZATIONS OPERATING UNDER AGREEMENTS WITH THE NATIONAL INSTITUTE OF EDUCATION. FURTHER REPRODUCTION OUTSIDE THE ERIC SYSTEM REQUIRES PERMISSION OF THE COPYRIGHT OWNER

WORKING PAPER NO. 2

The work reported in this publication was supported by NIH Grant 5-R01 LM 01857-02 from the National Library of Medicine--Continuing Education for Health Sciences Library Personnel

1 R004546

Table of Contents

		Page
	Checklist for Planning and Teaching	1
	Principles and Practices	5
I.	Responsibilities	7
II.	Determining the Scope of a Course	8
	Objectives	9
	Target Population	13
	Time Available	14
	Articulation with Other Courses	16
	Course Announcement	16
III.	Designing Learning Activities	18
	Basic Concepts	18
	Sequencing Learning Activities	21
	Individualization of Instruction	22
	Time Schedule	23
	Social Reinforcement	24
IV.	Choosing Methods and Techniques	27
	Presentation Techniques	28
	Application Techniques	30
	Group Techniques	33
V.	Evaluating Instruction	37
	Pre-Testing	38
	Formative Evaluation	38
	Summative Evaluation	39
	Long-Term Evaluation	40
VI.	Planning the Course	41
	Plans in Writing	41
	Availability of Needed Facilities	43
	Audio-Visual and Other Devices	44
	Hand-Outs for Post-Course Use	44
	Footnotes	45
	Bibliography	46
	Appendix	48

A CHECKLIST FOR PLANNING AND TEACHING
MIA CONTINUING EDUCATION COURSES

The following are items that should be considered in planning and teaching MIA continuing education courses. The page numbers at the right of the checklist items indicate the pages where the text applicable to those items may be found.

This checklist is not intended to be exhaustive--it is just a representative list to exemplify the kinds of factors to be taken into consideration. Similarly, the questions under the items represent data and concepts generally required for effective planning and teaching. On the other hand, not all items apply to every course. They are listed here so that they will not be overlooked in cases to which they do apply.

The sequence in which the items are listed is merely one of many sequences possible, depending on the kind of course being planned. In some cases--for example, courses for certification--consideration of the certification requirements may be the best starting point in planning the course.

Factors to Consider	Text Pages to Consult
Scope of the Course	
Objectives--Needs to be met	9
What knowledge and understanding will participants be expected to gain in the course?	
What skills should they master?	
What assistance will they need to integrate the knowledge and understanding into their existing behavior patterns?	

Factors to Consider	Text Pages to Consult
Target Population--background, position, duties	13
For whom is the course intended?	
Will it start where they are?	
Will it take them where they want to go?	
Time Available	14
Can the course be covered in the time available?	
Should some parts be omitted?	
Should the course be split--one part for beginners and one for advanced participants?	
Articulation with Other Courses	16
Does this course overlap other courses?	
Is this course the prerequisite for another course?	
Is it intended to follow another course?	
Course Announcement	16
Is the course description complete and clear enough to enable prospective participants to determine whether the course meets their needs?	
Can a prospective participant tell whether he is qualified to take the course?	
Are the course objectives spelled out?	
Designing Learning Activities	
Sequence of Learning Activities	21
Does the sequence follow a logical development of the subject matter or a learner-interest sequence?	
Individualization of Instruction	22
Does the course plan provide for flexibility of sequence and pace of instruction if needed to match capabilities of students?	
Time Schedule	23
Does the schedule provide time for working with students who need special help?	
Social Reinforcement	24
Are learners' views welcomed and treated seriously?	
Are learners asked what problems and interests they have as a guide for conducting the course?	
Does the seating arrangement permit direct eye contact among all members of the class?	
Are the learners introduced to each other?	
Do they have opportunities to discuss problems and exchange views among themselves during the course?	

Factors to Consider	Text Pages to Consult
Choosing Methods and Techniques	
Presentation Techniques	28
Will the lecture and/or demonstration be stimulating enough to hold learners' interest?	
Will training aids, films, discussions, and examples of applications be used to help learners understand the concepts presented?	
Application Techniques	30
Will learners be given typical problems to solve?	
Will case studies be used to show how to apply concepts and principles in realistic situations?	
Group Techniques	33
Will the class be divided into small groups for special tasks?	
Is role-playing planned to dramatize concepts and develop skills in human relations?	
Evaluating Instruction	
Pre-Testing	38
Are learners tested at the start of the course to determine what knowledge of the course content they already have?	
Formative Evaluation	38
Is there ongoing evaluation through observation, questions, and discussion to determine how well the instruction is getting across?	
Are the results fed back to the learners?	
Summative Evaluation	39
Are certification requirements (where applicable) satisfied by the formal test at the end of the course?	
Are learners asked for their evaluation at the end of the course?	
Long-Term Evaluation	40
Will learners be surveyed months after the end of the course as to how useful they found the course?	
Will they be asked in what ways the course influenced their operations or policies?	

Factors to Consider	Text Pages to Consult
Planning the Course	
Plans in Writing	41
Are the lesson plans written in sufficient detail to guide the instruction?	
Are the plans clear enough for another instructor to follow effectively?	
Have arrangements been made for incorporating the results of review and consultation with those who taught the course previously?	
Availability of Needed Facilities	43
Is the room scheduled for the course satisfactory in size, ventilation, electrical outlets, furniture?	
Audio-Visual and Other Devices	44
Have arrangements been made for the needed training aids to be on site in good working order when needed?	
Has consideration been given to alternative techniques to be used in case the devices are not on hand or inoperative?	
Hand-Outs for Post-Course Use	44
Will summaries of data, procedures, and policies be distributed to learners?	
Will special bibliographies be handed out?	
Can directories or other guides to consultants and resource people be compiled for students?	

Principles and Practices

Teaching is an art. It involves attitudes, feelings, and personal relationships as well as knowledge, skills, and understanding. In fact, as Houle has pointed out, teaching is a cooperative art. (1) It differs from operative arts such as painting or sculpture in that the artist (teacher) deals not with inert materials but with people, and he has only limited control. He needs his students' cooperation; only through them can he succeed as a teacher. Nor is the teacher the only influence on his students even in his classroom. Interactions among his students can affect the learning process more than he can. Teaching is a complex process.

That is why there is no specific "right" way to teach. Many different approaches and methods can lead to good results. However, there are principles which, properly applied, can appreciably increase teaching effectiveness. The purpose of this guide is to suggest how these principles can be put into practice in planning and teaching MLA continuing education courses.

Many good books have been written about these principles, and some of these books are listed in the bibliography on page 46. They are recommended for your study since this guide can only touch lightly on the various aspects of teaching. It is just an introduction--an outline you can fill in and expand through

study and experience. No attempt is made to delineate responsibilities for the various types of action suggested here, for that is an administrative function and can change considerably over a short period of time.

The guide is divided into three main parts--a checklist, text, and Appendix. The checklist covers the factors to be considered in planning and teaching continuing education courses. The text discusses these factors briefly, presents applicable principles, recommends action to be taken, and lists pertinent references. The Appendix includes copies of pertinent MLA bulletins and forms as well as samples of materials used in various courses--exercises, case studies, and the like.

Though not all factors discussed here apply to all courses and conditions, they are included so that they will not be overlooked when they do apply. Another variable is the sequence in which the factors are considered. The sequence followed here is only one of many feasible sequences. If it is not suitable for your situation, change it.

That advice applies to every part of this guide, for it is not a step-by-step book of recipes. It is more like a map of hidden treasure which requires much deciphering and a lot of digging before the treasure is yours. You will have to use judgment to determine how you can best adapt the suggestions in this guide to achieve student learning and teacher satisfaction in your courses.

I. Responsibilities

The purpose of this guide is to present some basic principles in planning and teaching continuing education courses and to suggest how they may be applied. No assumptions are made here as to who has the responsibility for adding new courses and dropping or modifying old ones, who determines course objectives and requirements for prospective participants, who evaluates progress made, and who follows up participants to determine long-range results.

Whether a particular function is the responsibility of the Continuing Education Committee, the Division of Education office, local arrangement committees, syllabus developers, teachers, or any coalition of these, consideration of the suggestions made here can contribute toward a more effective program. Additionally, if all involved are familiar with the applicable principles and generally agree with them, program development and effectuation can be more consistent and less likely to be weakened by misunderstandings. In any event, responsibilities have to be spelled out and every member of the team should know not only what he has to do but also how it fits in with what others must do.

II. Determining the Scope of a Course

Determining the scope of a course requires consideration of the whole range of interests of the association and its members. Why does the association want this course offered? to solve a widespread problem? to fill new types of positions? to prepare members to meet new certification requirements? to upgrade members and help them advance on the career ladder? or any one of a host of other reasons?

And the members themselves--for which of these reasons do they take the course? Or do they take it, not for career reasons, but for self-satisfaction--to increase their knowledge? or, perhaps, for social reasons--to get together with their peers?

What about the course objectives and contents: are they based on researched competence models? judgment of experts? availability of facilities and instructors? availability of time? or some other special factors?

These are important considerations in course planning and are always taken into account, even if only by tacit assumption. Naturally, the more clearly these factors are spelled out and acted on, the more likely it is that the course will achieve its objectives. Note must also be taken that all these factors are interdependent--each one affects all the others.

This chapter discusses these factors under four headings: Objectives, Target Population, Time Available, and Articulation

with Other Courses. It concludes with a discussion of the Course Announcement.

Objectives

Objectives constitute the foundation on which courses are built. They grow out of the requirements of all: the profession, the libraries, the association, and the individual members of the association. As an example, suppose the Continuing Education Committee determines that the installation of a new type of equipment in some libraries makes it desirable to teach librarians how to utilize this equipment effectively.

Shall a new MLA course be offered to achieve that objective? Or can it be achieved by incorporating study of the equipment in a course already being offered either by expanding the course or by replacing some part of it? Perhaps the objective can be achieved through training provided by the equipment manufacturer.

In determining what options are open and which of these should be chosen, course planners should analyze the overall objective, namely, to help librarians get maximum benefit from the new equipment. Should that include as a sub-objective overcoming resistance to the new procedures on the part of some librarians? teaching librarians how to operate the equipment themselves? teaching them how to revise existing policies and procedures to take advantage of the new capabilities provided by the new equipment? These and other decisions on objectives can have a major effect on the course or courses covering

the new equipment and how it is used.

In another case, reports that certain functions are not being performed satisfactorily may reveal the need for courses or course changes to enlarge the knowledge or skills of those doing the work or to change their attitudes so they can apply the knowledge and skills they already have. Sometimes it may be found that there is a dearth of people qualified for some jobs. Likewise, studies may show the need for new or different courses to increase opportunities for career advancement. These are just a few examples of needs which must be translated into objectives for various courses.

The more fully objectives are enunciated and disseminated among those involved, the more likely it will be that the objectives will be effectively implemented and the less likely that those involved will work at cross-purposes. Clear statement of objectives in terms of the specific changes expected as a result of taking the course can also help in determining the prerequisites for the course, selecting the subject matter to be covered, and deciding on the teaching techniques to be used.

Publicizing the specific objectives and prerequisites can help attract to the course those who should take it and steer away from the course those not qualified or interested. This kind of guide to participant self-selection can be useful, but by no means does it ensure a homogeneous class. Participants will still have their own objectives growing out of their requirements, knowledge, and experience. To make the course

as applicable as possible, they should be given the opportunity to make their input to the course objectives where and when feasible--for example, through discussion at the beginning of the course, perhaps through pre-course correspondence as discussed later.

Objectives are stated in a variety of ways. Sometimes descriptions of the subject matter to be covered, such as, "planning a meeting," "preparing a test," or "motivating students" are presented as objectives. Other kinds of statements may give the intended results of the course as objectives but in such broad terms that they provide little direct guidance to the instructor or participant; for example, "to gain an understanding of adult needs" or "to appreciate the role of the evaluation in teaching."

While objectives such as these indicate the general area to be covered and the overall aims of the course, they do not present the specific educational results expected. The most specific statements of objectives are those called behavioral, or performance, objectives. They focus on the demonstrable changes in participant behavior as a result of the course. When the concept of behavioral objectives is fully implemented, the statement of objectives specifies the performance expected of participants at the end of the course, the conditions under which they perform, and the criteria of acceptable performance.

A means of further clarifying behavioral objectives is to classify them as cognitive, psychomotor, or affective. Cognitive objectives apply to the intellectual areas; they comprise demonstrations of knowledge, comprehension, application, analysis, synthesis, or evaluation of applicable data to the extent that they can be achieved in the course. Psychomotor objectives apply to the area of skills; they comprise demonstrations of neuromuscular skills ranging from simple motor tasks to complex skills requiring a high degree of neuromuscular coordination. Affective objectives apply in the area of emotions: feelings, attitudes, biases, motivations; they may range from demonstration of simple awareness of particular situations to full appreciation and sound judgment of values in complex situations. The three classifications listed here are reflected in the three questions under "objectives" in the checklist.

However objectives are expressed, it is of major importance that they be realistic--that they can be achieved within the limits of the time, facilities, equipment, and participants available. Initial assumptions as to available resources must be checked. If they will not actually be on hand, the objectives or the learning activities or both must be modified accordingly. Similarly, if the qualifications and objectives of the actual participants differ from those assumed, the objectives may have to be revised. In short, there should be a recurring cycle of evaluating the effectiveness of the revised learning activities in the light of the objectives and evaluating

the achievability of the objectives in the light of the learning activities. To facilitate this, objectives must be flexible, practical guidelines stated as specifically as possible, appropriate to the situation, and in line with the needs of the profession and the participants.

Target Population

Course objectives can be achieved only by the participants. A course cannot be planned, therefore, without making some assumptions as to the qualifications participants must have in order to achieve the course objectives. Sometimes, courses are planned specifically for people in particular positions or with particular types of duties. This kind of information should be included in any publicity on the course and in all course announcements in order to clarify requirements to prospective participants and enable them to determine whether this is the best course for them at the time. Initially and, to a large extent, all the way through, this is a process of self-selection. Normally the instructor cannot counsel the participant directly until the course has begun. Even then, however, if a participant is unsuited for the course, he should be counselled to transfer to another course more suitable for him. If he cannot be persuaded, the instructor should try to accommodate his needs but only to the extent that it does not interfere with the work of the other participants.

Sometimes earlier counselling is possible. The instructor may receive the roster of course participants in time to write to them and find out their qualifications and objectives. Application forms can be prepared for this purpose.

Pre-course correspondence offers the added advantage of permitting revision of the course objectives to accommodate participants' needs. It may also allow the instructor to send instructional materials to the participants so they can come to the course better prepared. From the point of view of the participants, it affords them the opportunity to submit problems and cases for consideration early enough to permit their incorporation in the course if they are suitable for the purpose.

Time Available

When courses are limited to half a day or a day--two days on rare occasions--there is some danger that an instructor will push too hard in an attempt to cover as much material as possible. That can be--and often is--self-defeating. It is important, therefore, to limit the scope of the course to what can be properly handled, allowing time for such activities as participation by members of the learning group, special treatment of concepts not understood fully by the participants, and helping the less qualified gain the necessary comprehension.

In terms of objectives, it is generally unrealistic to expect to achieve the higher levels of the cognitive-psychomotor-affective taxonomy in the short time available. In the cognitive domain, for example, comprehension--occasionally applica-

tion--is usually the highest level achieved in that short a time. In the affective domain, a course of short duration may have the objective of increasing awareness of certain concepts, leaving development of precision in their application as an objective of subsequent courses or of individual study. Of course, if the participants are well qualified even a short course can help them achieve some of the higher level objectives.

To make the most of the time available, it is important to look for procedures that save time without lowering effectiveness. For example, whenever possible, straightforward factual information should be provided to the participants by means of hand-outs instead of dictation to participants or blackboard display. With data such as lists of procedures, rosters of resource personnel, or bibliographies, hand-outs not only save time but also provide more complete data in a more convenient form. Using flip charts, transparencies, and easel presentations which the instructor can fill out before the class starts instead of writing the information on the blackboard can also save class time and still let the instructor retain control as to what is shown at a given time.

Another way to save group time is to send prospective participants case studies, problems, or other instructional materials before the course starts. Naturally, only reasonable amounts of directly pertinent material should be sent, accompanied by specific and clear instructions as to what the prospective participant is to do with it. As pointed out elsewhere in this guide, the pre-course material can help less qualified partici-

pants raise their level and make for a more homogeneous group. Asking prospective participants for their objectives and problems before the course starts can also save group time by giving the instructor prior information and helping him make his plans more applicable to the needs of the participants.

Articulation with Other Courses

In determining the scope of a course, planners should check whether the course fits in a sequence as a prerequisite or follow-up. If it does, the scope of the courses involved should be coordinated to eliminate gaps as well as undue overlap. In announcements about any of the courses, the relationship should be described so that a prospective participant can take the courses in proper sequence or take only those applicable to him.

Course Announcement

A course announcement should provide the prospective participant with the information he needs to determine whether the course is for him. By giving the objectives of the course, describing its content and instructional approach, and spelling out the qualifications required including academic prerequisites if any or the target population sought for the course, the announcement can help attract the desired type of participants and discourage those for whom the course is unsuited.

For this purpose, the announcement should indicate whether the course is planned for people in certain types of positions or with particular types of duties. Similarly, if the course is designed to prepare people for a new type of position or library, that should be specified. If the course is one of a sequence or courses, that too should be made clear.

III. Designing Learning Activities

Basic Concepts

Obviously, in most learning activities, both the teacher and the learner are important. In modern educational theorizing, however, there has been a shift in emphasis from teacher to learner, in large part as a result of growth in our understanding of the learning process. At one time many educators believed that learning occurred primarily through the transmittal of information by a teacher to students and was effective to the extent of the teacher's ability to present the information clearly and interestingly. They modernized the presentation and made it more effective by the use of audio-visual and other aids, but in their eyes teaching was still the primary path to learning.

Now, recognition is growing rapidly that what goes on within the learner is of greater importance. His experience--emotional as well as intellectual, particularly in the case of an adult--make the big difference. What he learns and how well he learns it depend on his self-concept, attitudes, fears, biases, and inhibitions. If the instructor does not understand this, there is the danger that, though the learner is able to verbalize various ideas satisfactorily, he will resist change in his behavior (the purpose of learning) because he is afraid to give up his established attitudes and actions. That is one of the reasons why the learner should be involved in determining

the objectives and the learning activities designed to achieve those objectives.

The shift from emphasis on the teacher to emphasis on the learner came about in large part as a result of the findings of educational research which gradually uncovered some aspects of the complex processes involved in learning. At first, it was assumed that the learner is passive, that stimuli elicit responses from him more or less randomly, and that through reward the desired responses could be connected to the stimulus. In that view, teaching is essentially a matter of arranging stimuli in the proper sequences and rewarding the desired responses. Essentially, behaviorism and operant conditioning are based on that concept.

Further experimentation showed that the learner is not passive--he sees stimuli in patterns of relationship and responds according to the way he structures the stimuli. Later studies indicated that the learner responds selectively--accepting, distorting, or rejecting stimuli according to his own established feelings and views. In other words, learning is an emotional as well as a cognitive process. This means, further, that another important factor in learning is the learner's relationship with the other members of the learning group. Interactions among members of the group can influence the learning process intellectually and emotionally, and teachers should try to apply principles of group work, or"group dynamics" (discussed later in this guide) toward achieving the course objectives.

The implications of these and other studies for adult education are summed up by Getzels in seven propositions which postulate that learning depends on: (2)

Motivation -

for and against. Sometimes learning is blocked because it implies a change in behavior that is a threat to the learner and arouses his resistance.

Capacity -

to gain the applicable understandings and skills. Only learners who meet the minimum standards for the course should be admitted.

Previous experience -

also can help or hinder learning because it affects the way the learner structures the new experience and how well he assimilates it.

Perceiving relevant relationships -

The elements of the learning situation required for solving the problem under consideration should be so arranged that the learner can see the "big picture" and organize the applicable parts in their proper relationship to solve the problem.

Active search for meaning -

learner must be given opportunity to fumble--that may be his path to the objective.

Feedback (evaluation of progress) -

indications of progress toward the goal help keep motivation high.

Satisfactory personal and social adjustment in the learning situation -

participants working amicably together on common problems.

Sequencing Learning Activities

The subject matter of a course can be studied in basically one of two types of sequence: on the basis of the logical flow of the contents or on the basis of learner interest. It may proceed in chronological order as in history and history courses. It may move from simple to complex as in many science courses; a biology course, for example, may start with single-celled animals and go up the classification scale to vertebrates. In some fields, for example algebra, the need to understand some principles or procedures before others can be learned forces a sequence on the teaching of those courses. Geography, on the other hand, demands no sequence of coverage, but it is often taught in a whole-to-part sequence, starting with the globe and proceeding to individual areas or starting with a country then proceeding to the different parts of the country.

Another approach to sequence is to base it on learner interest, starting where the learner is and helping him go as far as possible toward the objectives. A course can start with learners' problems or expressed needs and interests, then develop the data and concepts required to satisfy them. One way this can be done is through a case study type of approach. Even subjects that have a logical internal sequence can be turned

around and treated in psychological order--that is, in a sequence which will capture and hold student interest. In history, for example, the course can start with a current problem--say, the crisis in northern Ireland--go back in history to find out, if possible, how it started, then turn to another part of the world with similar problems, make comparisons, past and present, and try to develop general principles which might explain both situations.

Another consideration in sequencing is the desirability of providing opportunities for the learner to get indications of progress at intervals throughout the course in order to maintain his interest. In every case it must be remembered that it is not knowledge of the details of the data that is the primary objective of the course but understanding and appreciation of the principles involved so that the learner becomes more skilled in developing new data for himself and is motivated to act accordingly.

Individualization of Instruction

Providing for individual needs is always a difficult task. In short courses, it is particularly difficult. To keep the range of individual differences in ability and background as narrow as possible, it is important to announce and disseminate as widely as possible clear statements of the course requirements and objectives. Another measure which can help a little is to send prospective participants instructional materials well before the course starts so that they can bring their qualifications up

closer to those required. Of course, if one or two members of the group are decidedly out of their depth in the course, they ought to be counselled tactfully but firmly to drop or change the course.

If the instructor can get information a week or two ahead of time as to the size of the group and the qualifications of its members, he should try to accommodate the range of individual differences by planning learning activities that will permit dividing the group into small groups of matched or balanced qualifications. Another technique is to have the more knowledgeable and more experienced members teach the less qualified in special sessions. That will make it possible, to some extent, for each group member to achieve those objectives for which he is qualified. See "Choosing Methods and Techniques" starting on page27 for some which may be applicable.

Time Schedule

In a short course, the loss of half an hour is, percentage-wise, a tremendous loss of time. It is important, therefore, that time allocations be worked out as accurately as possible. At the same time, because of the special requirements of individual participants, the instruction plan must be flexible. This means that time must be allowed for special situations. In other words, a schedule should be prepared with several possible variations that provides for maximum and minimum coverage. In that way, if time is available, a plan is ready to put it to good use.

Social Reinforcement

Whether you plan it or not, whether you use presentation techniques, application techniques, or group techniques--when you teach a group of people, they interact--and their interactions can affect their learning positively or negatively. Interactions on the positive side--those which create a congenial climate and team spirit that support learning--are called social reinforcement.

An instructor can help develop social reinforcement by serving as a supportive role model, by making the physical setting conducive to the active participation of all members of the group, and by encouraging cooperation and collegiality among all.

Supportive Climate

The instructor is the leader of the group, and his attitude sets the tone for the learning activity. If he is open and friendly, if he is interested in finding out what the members of the group want from the course,and if he works with them to achieve these objectives to the extent compatible with course requirements, the members of the group will see that their opinions count and that they are engaged in a truly mutual effort. This can bring out the best within them, especially if the instructor's example and techniques result in a similarly cordial and helpful attitude among the group members.

Physical Arrangements

Every aspect of the learning situation, including the room where the group meets, can affect the attitude of the group members. Of course, a pleasant environment--with comfortable furniture, temperature, illumination, and ventilation--makes for an enjoyable learning situation and an alert and attentive group. But furniture arrangements are also important, for they set the tone in subtle ways. If the seats are fastened down or if they are arranged in a formal sort of pattern, members of the group can get the idea, even before a word is spoken, that everything is set and that they had better not make waves. On the other hand, if arrangements are informal and the instructor sits with the other members of the group, they are more likely to feel at ease and participate more fully. It is therefore worth checking the arrangement when you enter the room. Change the arrangement if you find that it isn't right. Position the seats in a circle or an oval or around a table in such a way that everyone can make eye contact and talk directly with everyone else in the group. If the group has to break into subgroups for special activities, help the members rearrange the furniture accordingly. Make the furniture arrangement fit the group--not vice versa.

Interpersonal Relationships

A good way to start is to ask each member of the group to introduce himself and tell a little about himself. This can be followed by a discussion of the members' objectives for the

course and how the different, perhaps contradictory, objectives might best be reconciled and achieved within the framework and time limits for the course. Some MLA instructors explicitly point out the responsibility of all members of the group to be supportive of each other and help bring out each other's point of view. They hand out and discuss their "Ground Rules for Team Building and Participation" a copy of which is in the appendix, on page 48.

Properly handled, such a discussion can build the members' respect for each other and foster an attitude of cooperation and a desire to work together to achieve common goals. Maintenance of this kind of attitude can help the members realize that they can express their ideas without fear of ridicule or off-hand dismissal. If each member of the group gets to feel that he is among friends and will be helped when he is wrong and encouraged when he has a good idea, he is likely to work hard during the course and act in accordance with the principles of the course long after it is over.

In this connection, however, it must be remembered that the prime purpose of the course is the achievement of its objectives. If no significant learning occurs, the course is a failure even if the members do enjoy it. Group satisfaction is important, but it should develop through solid achievements, not good fellowship for its own sake.

IV. Choosing Methods and Techniques

Opinions differ as to the definition of *method* and *technique* and the distinction between them. Houle uses the two terms interchangeably and defines both as, "an established and systematic way of learning or teaching." (3) Verner defines method as, "the organization of the prospective participants for purposes of education." (4) Under this definition, a class, a workshop, or a seminar is a method. Technique, according to Verner, is the "way in which the learning task is managed so as to facilitate learning." (4) Technique thus includes such ways of teaching as lecture, demonstration, and role playing. For simplicity the terms are used synonymously in this guide. Both are given in the title of this section so that, in looking for either, the reader will find both.

Different techniques serve different purposes and should be used as tools--each for the purposes for which it is best fitted. In deciding which to use, the planner should give consideration to the way they serve the objectives, group size, nature of the course as well as the instructor's ability to use them. Use of one technique does not preclude use of others in the same course. In fact, variety often helps maintain interest.

Presentation Techniques

The designation, "presentation techniques," as used in this guide, refers to such techniques as lecture, debate, panel discussion, demonstration, film, by which information or ideas are conveyed to an audience which has practically no voice in the process except to ask questions or express opinions when invited.

Properly implemented, presentation techniques offer various advantages. They can provide organized and efficient exposition of data and concepts in an interesting fashion. They can utilize a variety of formats and audio-visual aids, one or more presenters as applicable; they can respond to the questions asked by the audience. They are flexible and can be used in conjunction with other types of techniques. They can serve small groups as well as large audiences. However, like spectator sports, they often do not provide for significant learner participation. While presentation techniques are being used, the learner may be essentially passive.

The technique most commonly used in education is the lecture. A lecture is not necessarily a formal presentation to a large audience. It may be an explanation of an idea by a teacher to a small group of students in a classroom. It can be--and often is--an interesting, stimulating, and efficient method of conveying facts and explaining concepts. Often, though, it is difficult to gain and hold the full attention of the participants. Of course, humor, brevity, surprise, and variety can win attention for a while, and film slides, charts,

and other aids can help. But full learner involvement requires learner participation and his recognition of the relevance of the course to his needs and interests.

Lecture-type presentations can take many forms--two or more speakers, for example, can participate in a debate, interview, symposium, or panel discussion. They can each present different aspects of the subject or, in covering a controversial issue, argue the different sides.

For courses where it is applicable, a lecture-type presentation is advantageous, in that it can effectively serve as large an audience as the hall and accoustics permit. To provide an opportunity for audience participation, various groupings of members of the audience can be arranged at the session to consult together, and discuss, debate, or ask the presenters for clarification of the ideas presented. Small groups formed out of a large audience for this purpose are often called "buzz" groups. One simple way to form the groups is to use the seating arrangement; for example, in alternate rows, every three people sitting next to each other can be invited to turn around, and form a group with the three behind them and, as a group, decide on a group question of reaction to the speaker(s). A similar arrangement can create groups of four members, who can consult together (buzz) before or after the presentation without leaving their seats. Before the presentation, they can develop questions or statements of a problem of interest to them and ask the presenter(s) to respond during the presentation. After the presentation, the group might comment further.

Approaches such as these serve not only to get members of the audience to participate in the activity and probably bring up better questions and comments than might otherwise be the case, but also to create bonds within the groups and encourage commitment.

Application Techniques

Application techniques--comprising various forms of problem solving, case studies, and role playing--attempt to bring to learners realistic examples of typical problems they will encounter in their work. The chief purpose of this technique is to give learners practice and guidance in systematically analyzing a problem, then trying to solve it by applying the concepts and principles of their profession. The problems may range in complexity from simple procedural questions to sensitive relationships with clients, colleagues, subordinates, or superiors.

In many cases, some simulation of the real-life situation is attempted in order to make the learning more applicable. Simulation (as exemplified by the following paragraphs on problem solving, case study, and role playing) can also help motivate the learner and lead him to participate actively in seeking solutions to the problems presented. It can also provide a kind of sporting challenge which may help create both individual and team competition; in fact, in some programs, simulated problem exercises are referred to as games.

Simulation in the form of competitive games is widely used in management training. Teams or individuals playing various roles compete against each other in developing and demonstrating their ability to run a company, a campaign or other operation in competition with others. "In-basket" exercises are another type of simulation involving problem-solving and decision making. Various memos and other documents, each representing a different problem, are handed to each learner for action. A time limit is set, then the various decisions of the various learners on each of the problems are read and discussed.

Various simulation exercises have been used in MLA courses. Copies of some of these are included in the Appendix on pages 49-55.

Problem Solving

Probably the most frequently used application technique is problem solving because it is basic and is widely applicable. Whether the problem is a simple procedural one--for example, how to process an inter-library loan request--or a complex judgmental one--for example, how to allocate space among various library collections--the problem-solving steps are essentially the same: identifying the nature of the problem, seeking possible solutions, testing the possible solutions, evaluating, modifying the better ones then evaluating again, and, finally, selecting the solution considered most effective. Each of these steps may take only a few minutes of one person's time--like finding the applicable directive, determining which procedure fits the

problem, and following it. Or the steps may each be complex and require extensive data gathering and evaluation by various groups, then negotiation of a solution in a series of group meetings. Two application techniques often used in educational programs to teach problem-solving techniques are the case study and the role-playing techniques.

The Case Study

Perhaps the epitome of the application technique is the case study, for it is the record of a real situation, with relatively complete data, illustrating a problem typically faced and handled by professionals in the field. The case study approach to teaching has been in use for centuries and is widely practiced today in various fields. It is a useful technique becuase it presents actual cases which exemplify real situations, it is not amenable to solution by knowledge alone but requires judgment, and it does not have a "right" answer. As a result, it gives learners practice in coping meaningfully with problem situations. For an example of a case study, see the ones in the Appendix on pages 56-59.

Role-Playing

Role playing is another technique based on real-life situations but, in this case, involving human relations. In role playing, sometimes referred to as psychodrama, learners act out a problem situation, often a stressful one. Usually, they improvise their words and actions, to some extent they come to feel the pressures involved in the situation, and sometimes

they even arouse emotional reactions in the observers as well as in themselves. Through critiques and discussion, better ways of handling relationships are arrived at and the members of the group gain insight into their reactions and learn how to work with other people in difficult situations.

Group Techniques

Many discussions of class size seem to imply that the smaller the class the better, with the optimum at one to one--one teacher to one student. For many kinds of objectives--for example, acquisition of some skills and some types of subject matter, a one-to-one arrangement can be excellent. However, for many other types of learning objectives, particularly the affective, a group learning situation may be superior. Stimulation by other members of the group, opportunities to try out ideas on the others, the benefit of their experience, views, problems, and questions--all enrich the learning experience. Interactions among members of the group and the greater acceptability of ideas coming from peers rather than being imposed from above can have a strong influence on each member of the group, especially in changing interests, attitudes, and habits.

An oft-told example of this is a study of how women might be taught facts about nutrition with the objective of having them change their family diet accordingly. One half of the women participating in the study were taught in a large group by means of lectures, demonstrations, films, and other audio-visual aids. The other half of the women were divided into

small groups and studied the same subject matter by means of discussions under the guidance of instructors. All the women had the same number of hours of instruction and, at the end of the instruction, all the women took the same test. Practically no difference in knowledge of the facts was found between the half of the women taught one way and the half taught the other way. Some weeks later, all the women were surveyed to see whether they had changed their family diet. It was found that the women who had been in the discussion groups had changed their family diet significantly more than those in the other group. One explanation for the difference was that there was more personal participation in the small discussion groups and that the interrelationship among the women in the small groups strengthened their commitment.

This example also illustrates how a large class can divide into small groups for special purposes. For optimum participation, each group should have five to ten members. In general, it is best for the participants to choose their own group-mates, but the instructor should guide the grouping to insure balance, to prevent dominance by a few strong-minded individuals, and to avoid segregated ethnic, age, or occupational clusters. For most objectives heterogeneity in a discussion group is usually more desirable then homogeneity because the former results in a greater diversity of views.

Quite a few different types of techniques such as discussion, problem solving, case study, and role playing are suitable group activities. In fact, group functions can range from simple exposition of subject matter all the way to free expression of feelings directed toward relief of tension. On the other hand, group activity is not the only set of techniques available to meet educational requirements, nor is it best for all circumstances. Its best application is in situations where the chief objectives are in the affective domain. It should not be used indiscrimately or exclusively, particularly in courses a few hours in duration which have few affective objectives.

Managing group techniques takes careful planning and close monitoring to assure opportunities for all the group members to express themselves and yet avoid time-wasting chatter. Another problem is how to help the group operate systematically without pushing. For example, group members may find role playing an enjoyable activity but gain little more than pleasure because the role playing is not followed up by a group analysis of the situation presented and a systematic discussion of the concepts and procedures involved and their applicability to other situations. In short, discussion should not wander aimlessly--it should come to clear conclusions. Still, too much instructor interference, especially if accompanied by a rigid attitude can deprive the group of its inherent advantages. A strong-minded, dominant group member can also choke off par-

ticipation by other less agressive group members if he is not held in check. The instructor has a fine balancing act to perform.

V. Evaluating Instruction

Evaluation is the process of determining how well the objectives have been met at various stages in the course--what principles, process, and skills have been mastered and what behavioral changes have occurred as a result of the course.

Two different phases of evaluation are generally recognized, formative and summative. Formative evaluation takes place while the course is in progress. Its purpose is to determine what learning deficiencies and problems there are so that they can be corrected before the course is over. Summative evaluation comes at the end of the course. Its purpose is to measure the extent to which the objectives of the course have been met so that, if necessary, the course may be revised and improved before it is offered again.

Determining what progress has been made toward achieving the course objectives requires a statement of the specific objectives of the course, a base-line (starting line) showing where the learners stood when they began the course, and means for measuring how far they progressed from the base-line. Guidelines for establishing objectives are discussed in Chapter II, page 8 . As discussed in the following paragraphs, a base-line can be established by pre-testing at the beginning of the course, and progress can be measured by testing while the course is going on and at its conclusion. Testing does

not have to be done formally by means of pencil-and-paper tests. Oral questioning, discussion, and observation can also provide information as to progress and point up deficiencies to be corrected.

Pre-Testing

Pre-tests are given at the start of a course to find out where each learner stands in relation to the educational objectives for the course. Properly prepared, the pre-test can show what the learners already know and what they have yet to accomplish in the course. Thus the pre-test provides a base-line from which to measure learner progress as well as an agenda for the course. This may well serve to stimulate learner interest, for it enables learners to see for themselves what their weaknesses are and what they have yet to learn.

The information needed for determining a base-line can be developed through a written test, oral questioning, discussion of what the learners desire as course content, or observation of learner performance.

Formative Evaluation

As the course proceeds, the instructor gets feedback from the learners through their questions, their answers to his questions, the statements the learners make in discussion, even through the learners' facial expressions. An instructor can often tell at a glance by the puzzled look on the faces of the learners that an explanation was not clear. He can read the far-away look that indicates wandering attention and the

looks of satisfaction and the nodding of heads indicating comprehension and agreement. These also are part of evaluation. Another indication of how well the course is going might be called the participation quotient--what proportion of the group is participating. All these signs, and many others, as well as tests and oral questioning should be part of a continuing evaluation through which the instructor diagnoses the learning difficulties which must be overcome and tests the corrective measures he takes to help the learners achieve the aims of the course.

Summative Evaluation

All the methods for measuring the progress of the learner just discussed can be used for measuring the progress achieved by the end of the course. These measurements can then be appraised to determine what factors helped or hindered learning and what might be done to improve results the next time. Perhaps a different target population should be sought, perhaps objectives should be modified, techniques changed, or course contents changed.

If the course is one required for certification, it is obviously necessary to make sure that the course and any formal examination at its end cover all the areas of knowledge and skill required for competence.

Evaluation of the course by the learners is also desirable. The instructor may lead a discussion by the learners of the good and bad aspects of the course and the instruction. The instruc-

tor may also ask the learners to fill out a course evaluation form during or at the end of the course.

Long-Term Evaluation

The course results most difficult to measure are changes in behavior growing out of the learning which occurred in the course. These are practically impossible to measure accurately and objectively. It might be worthwhile, however, some months after the end of the course, to distribute questionnaires to those who took it asking for their opinions of the course in retrospect, what they feel to have been the most useful parts of the course, and to relate (document, if possible) ways in which their operations have changed as a result of the principles they learned in the course.

VI. Planning the Course

Planning is always an essential early step in teaching, but it is particularly important in MLA courses, since they are generally a day or less in duration. With course time so concentrated, it is highly desirable to prepare as much as possible ahead of time. This does not mean rigid procedures in instruction. Quite the contrary. In planning, the instructor tries to foresee the special needs and problems of learners, thinks them through, and is ready to handle them expeditiously if they come up.

In this connection, it is helpful if the instructor can have pre-course contact with the learners and find out their special requirements and recommendations. Of course, there will be some learners who will not have been reached before the course starts, and they may present unexpected problems. Even so, the instructor will be better able to handle the situation if he is prepared for at least some of the contingencies. Then, if additional difficulties arise at the beginning of the course, he can concentrate on those and, together with the learners, work out a set of learning activities to meet the needs of all those in the course.

Plans in Writing

No matter how familiar the instructor may be with his plans for the course and no matter how well he has them in mind,

he is better off if he puts them in writing. When plans are written out, they can serve as a memory aid to the instructor himself, a guide to other instructors who might be assigned to teach the course, and an excellent basis for review and revision when the course is to be offered again.

Memory Aid

Written lesson plans help insure that no important aspects of the course are overlooked inadvertently. They also make for more efficient use of course time, for they include tentative time allocations for the various phases of the course and lessen the likelihood of spending so much time on one topic that others cannot be covered properly. They also permit better balanced coverage by specifying the minimum to be covered and by including provisions for additional topics to be discussed if time is available.

Guide to Other Instructors

If other instructors are to teach other sections of the course or if the course is offered at other times or places--for example, at regional meetings--detailed written plans simplify the task of preparing other instructors for the assignment and help maintain consistency in treatment and coverage.

Facilitate Review and Revision

When it is necessary to discuss the course with others, written plans are invaluable both for comparing the planned procedures with what was done previously and for recording any new approaches in the instruction or revisions in content.

Pre-Course Communication with Learners

As mentioned before, with the concentrated time schedules for MLA courses and the normal heterogeneity of the learners, pre-course communication between instructors and learners can greatly increase the range of instructor and learner achievement. If the instructor can secure information about the prospective enrollees for the course--their qualifications, their objectives for the course, and their needs in that specialty---he can better tailor his course to fit the particular requirements of the group members. Similarly, if he can send case studies, preliminary readings, and other instructional materials to prospective learners, they will be able to come better prepared, constitute a more competent learner group, and accomplish more in the course. Naturally, pre-communication greatly increases the amount of pre-course work for both learner and instructor and often is very difficult to arrange. Where possible, however, the effort may be generously rewarded.

Availability of Needed Facilities

Whether or not an instructor specifies the kind of facilities he is planning on for his course, he does make assumptions about them in his planning and can be quite upset if they are not available. He may take it for granted, for example, that his room will have a blackboard and chalk. However, if he does not specify it, he may find himself in a room without them, disturbed in his composure as well as in his teaching. It is essential, therefore, for the instructor to determine carefully

and specify completely what he needs in the way of room size, ventilation, electrical outlets, furniture, blackboard, and the like. A copy of LA forms for this purpose as well as a sheet of outlines of various seating arrangements suggested for various types of courses are included in the Appendix on page 60.

Of course, even when he does spell out his requirements there is no guarantee that they will be met. Various circumstances may make it impossible. Consequently, it is necessary not only to specify the facilities needed but also to plan how to proceed if the actual facilities are not adequate.

Audio-Visual and Other Devices

Needed training aids, like facilities, must be fully specified. It cannot be assumed, for example, that because a projector is ordered, a screen will also be available. Nor can it be assumed that what is delivered will be in good working order. Here, again, contingency procedures must be planned in case devices planned for are not there.

Hand-Outs for Post-Course Use

Hand-outs can help the learners apply their knowledge and make further progress on their own after the course is over. Typical hand-outs include data summaries, procedures, special bibliographies, directories of consultants and resource people, and other, similar material which might not be readibly available to the learners. Planning such hand-outs ahead of time and having them ready when the course begins enables the instructor to save the time it would take him to write the information on a blackboard or to dictate it to the learners.

FOOTNOTES

[1]Cyril O. Houle, The Design of Education (San Francisco: Jossey-Bass, Inc., 1972), p. 227.

[2]J.W. Getzels, Learning Theory and Classroom Practice in Adult Education (Syracuse, New York: University College of Syracuse University, 1956), pp.8-11.

[3]C.O. Houle, The Design of Education, p. 236.

[4]J.R. Kidd, How Adults Learn (New York: Association Press, 1973), p.245.

Bibliography

Aker, George F. Adult Education Procedures, Methods and Techniques: A Classified and Annotated Bibliography. Syracuse, New York: Syracuse University Library of Continuing Education, 1965.

Bergevin, Paul; Morris, Dwight; and Smith, Robert. Adult Education Procedures: A Handbook of Tested Patterns for Effective Participation. Greenwich, Conn.: Seabury Press, 1963.

Bloom, Benjamin S.; Hastings, J. Thomas; and Madaus, George F. Handbook on Formative and Summative Evaluation of Student Learning. New York: McGraw-Hill, 1971.

Craig, Robert L. and Bittel, Lester R. Training and Development Handbook. New York: McGraw-Hill, 1967.

Dale, Edgar. Audio-Visual Methods in Teaching. New York: Dryden Press, 1956.

Galvin, Thomas J. The Case Method in Library Education and In-Service Training. Metuchen, N.J.: The Scarecrow Press, 1973.

Getzels, J.W. Learning Theory and Classroom Practice in Adult Education. Syracuse, New York: University College of Syracuse University, 1956.

Houle, Cyril O. The Design of Education. San Francisco: Jossey-Bass, Inc., 1972.

Jensen, Gale; Liveright, A.A.; and Hallenbeck, Wilbur. Adult Education: Outlines of an Emerging Field of University Study. Washington, D.C.: Adult Education Association of U.S.A., 1962.

Kidd, J.R. How Adults Learn. New York: Association Press, 1973.

Knowles, Malcolm S. The Modern Practice of Adult Education. New York: Association Press, 1970.

Mager, Robert F. Preparing Instructional Objectives. San Francisco: Fearon Publishers, 1962.

Miller, Harry L. Teaching and Learning in Adult Education. New York: The Macmillan Company, 1964.

National Association for Public School Adult Education. A Treasury of Techniques for Teaching Adults. Washington, D.C.: National Education Association, 1964.

Smith, Robert M.; Aker, George F.; and Kidd, J.R. Handbook of Adult Education. New York: The Macmillan Company, 1970.

Thelen, Herbert. Learning Theory and Its Application to Classroom Teaching. Syracuse, New York: University College of Syracuse University, 1956.

Verner, Coolie and Booth, Alan. Adult Education. Washington, D.C.: Center for Applied Research in Education, 1964.

Zachert, Martha Jane. Simulation Teaching of Library Administration.

Zoll, Allen A. 3rd. Dynamic Management Education, 2nd Edition. Reading, Mass.: Addison-Wesley, 1969.

APPENDIX A

Ground Rules for Team Building and Participation

To participate in this course, you must agree to abide by these rules:

1. Responsibility to input information you have
2. Listen carefully to one another and respond - no one person shall hog the floor
3. Sharing leadership
4. Maintenance function
   - 3rd person harmonizing 2 conflicting points of view
   - supporting people in your group
5. Focus on the task in front of you.
6. Different viewpoints should be named and understood.
7. Anyone can ask for clarification at any time.
8. No move should be made to recommend solutions to problems until the problem is named and agreed upon.

CONSENSUS (if purpose of task)

9. Each individual is heard and understood
10. Equal opportunity to influence outcome
11. All are willing to go along with final recommendations.

CONFLICT RESOLUTION

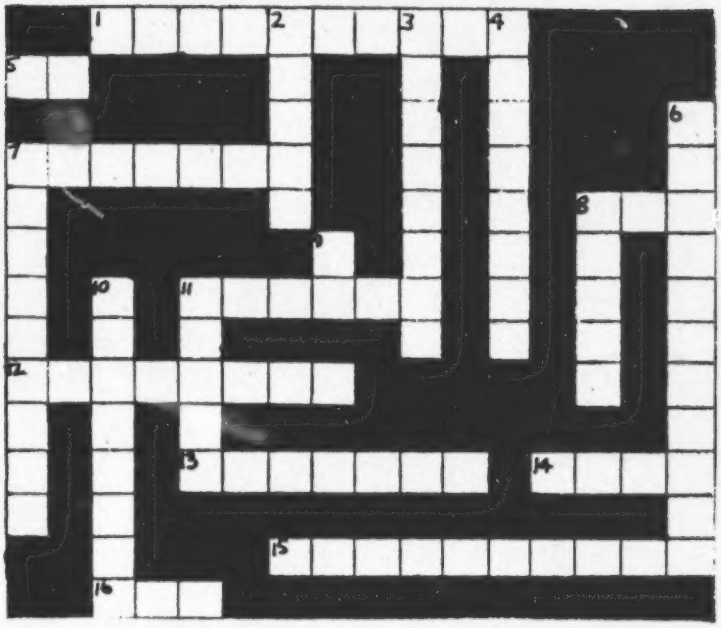
- No conflict present - boring situation
- Conflict present and not able to handle it

Instead
- focus on area at hand
- be candid in disagreeing
- be factual about the issues, not emotional

-- Courtesy of J.A. Virgo

APPENDIX B

Games
MISSION:MeSH



ACROSS

1. The two part division of MeSH consists of an alphabetical list of main headings and cross references. The second part is a list of..... (categories)
5. Symbol meaning: see also specific from reference (XS)
7. MeSH is published as part 2 of the.....issue of Index Medicus. (January)
8. MeSH appears.....time(s) during the year. (two)
9. Symbol meaning: see from reference (X)
11. The MEDIARS Indexing.....gives the explanation for proper usage of the MeSH. (manual)
12. NIM terms are.....Medicus. (non-index)
13. XR means see also..... (related)
14. Subject headings listed in bold type are called.....headings. (main)
15. BRAIN (A8). The(A8)is symbolic of the category of 8th division of.....terms. (anatomical)
16. Does the Cumulated INDEX MEDICUS include MeSH? (yes)

DOWN

2. Most of the anatomical terms in MeSH are derived from this reference tool:.....ANATOMY. (Gray's)
3. Author entries include last name plus..... (initials)
4. MeSH indexers use the most.....MeSH terms to describe an article. (specific)
6. Headings needed immediately for indexing within the calendar year of the publication. (provisional)
7. The author of a syndromes text most widely used by MeSH indexers is Stanley..... (Jablonski)
8. References in the author section cite a maximum of .....author's names. (three)
9. Symbol meaning: see under from reference (XU)
10. The MeSH is revised..... (annually)
11. MeSH see references are soon to be searchable in MEDLINE and are called.....descriptors. (minor)

Reprinted from The Herald.

Job Description Exercise

Please prepare a job description for the first professional position you would like to have upon graduation from library school.

Include on a separate sheet a brief description of the imaginary parent organization, with organization charts of the total organization and the library (if the library is large enough).

State whatever assumptions you have made about the library and the organization.

Be concise, clear, and brief.

Planning a Library Organizational Analysis Study: An Experience in Library Team Planning

Developed by
The Association of Research Libraries
Office of University Library Management Studies

The Situation

The Library Director has just assigned you to a newly formed group which is to complete a management study of the library. The group has been assigned responsibility and authority to first design a plan for conducting the study and then after the library director has reviewed and accepted your plans, carry out the study.

The work group is made up of representative elements of the library staff and clientele. None of you have been told anything about the study, other than this type of study has been successful elsewhere and it will grow to sizeable proportions requiring additional people.

The Problem

Despite the lack of information regarding the study, your group must now design a preliminary plan for managing the study. On the next page is a list of 18 specific activities arranged in random order. Your assignment is to rank order these activities according to the sequence you would follow in managing the study. This sequence will be reivewed by the library director before you are given approval to begin the study.

Step 1

Since you have a few minutes before the group meets for the first time, go over the list of activities on the next page and without discussing it with anyone, rank order the activities according to the sequence you think should be followed. Start with "1" for the first activity through "20" for the last activity.

Step 2

Now, as a group, agree to the sequence of activities that should be followed.

MANAGEMENT ACTIVITIES	Step 1 Individual Ranking	Step 2 Group Ranking	Step 3 OMS Expert Ranking	Step 4 Difference Between 1 and 3	Step 5 Difference Between 2 and 3
A. Design and conduct a survey on library needs and future requirements (i.e., secure judgements on what the library should be doing more of, less of, or differently in order to accomplish library objectives).					
B. Prepare library study report.					
C. Identify and analyze the job tasks necessary to complete the library study.					
D. Set study objectives in terms of specific results desired.					
E. Discuss library study report with interested elements of the staff.					
F. Analyze library management practices in the areas of planning, organization, and personnel.					
G. Determine library director's expectations and requirements.					
H. Review library objectives and the process of preparing and using these statements in day-to-day operations.					
I. Review the general characteristics of the current library situation (i.e., new library director, low staff morale, recently reduced budget).					

MANAGEMENT ACTIVITIES	Step 1 Individual Ranking	Step 2 Group Ranking	Step 3 OMS Expert Ranking	Step 4 Difference Between 1 and 3	Step 5 Difference Between 2 and 3
J. Determine resources needed to support library study (budget, facilities, equipment, etc.).					
K. Discuss report with library director and other key library administrators.					
L. Examine progress towards study goals and determine whether all major concerns have been treated.					
M. Develop implementation approaches for recommendations in library study.					
N. Develop a basic course of action and strategy (priorities, sequence, timing of major steps) for producing desired results in library study.					
O. Investigate major technological, professional, and educational trends and determine implications for the library.					
P. Determine checkpoints for the library study.					
Q. Acquaint the staff with the nature and intent of the library study.					
R. Make implementation assignments.					

54

In-Basket Exercise

COLLEGE OF PHYSICIANS OF PORT PIRIE
(Inter-Office Memo)

To: Librarian

From: Robert Darwent, Safety Officer

Date: February 4, 1975

Re: Library Plans

I have just examined the proposed floor plans for the new company library. Based on this brief examination, I am convinced of two violations of the OSHA regulations. First, all shelving must be at least half the distance apart as they are high. Thus, your 96" shelving must be 48" apart and not 30" apart. Second, no work areas or desks may be located within three feet of any of this shelving. As such, I cannot approve your plan.

Your failure to correct these violations will result in a substantial per diem fine as soon as the OSHA representative visits our plant. This fine will not be lifted until the violations are corrected.

cc: JWB, Head Administrative Affairs

APPENDIX C

Case Study
Siting the Library Exercise

Fullerton General Hospital is a 500 bed state supported hospital. Set in sprawling grounds, its low buildings are spread amongst gardens, a chapel and recreational facilities. The hospital was built in the early 1940's, the sprawling design an attempt to minimize the effects of potential bombing attacks. A rough plan of the hospital grounds, is attached on a separate sheet.

The hospital is staffed, in its upper echelons, primarily by older people. The Director of Nursing is near retirement age. The Director of Medical Services is an ambitious person with aspirations of becoming the leading medical administrator in the country. The institution has traditionally been conservative and sexist in the roles and attitudes but the climate is changing, with the development of internship and residency programs in the past several years, and because of changes in society itself. (Several of the residents and interns are women).

The medical library, located in the physicians' quarters on the 2nd floor of the administrative services building, serves the entire hospital staff - physicians, allied health workers, and support staff (laundry, gardeners, etc.). Although the library serves the Director of Nursing Education, until recently there had only been a small LPN program in the School of Nursing and trained nurses in the hospital were discouraged from using the library because the Director of Nursing thought it inappropriate for nurses to be in the doctors' quarters.

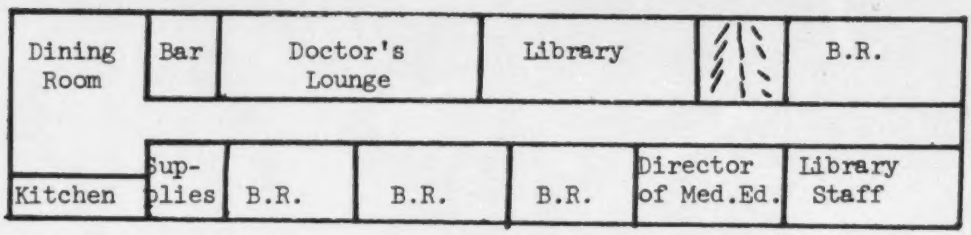
Because of crowded conditions, the medical librarian and two assistants are located in a room separate from the medical library, across the hall. The location of the library is very convenient, as it is right in the doctors' quarters where they come for coffee each morning and afternoon, and eat lunch. Some of the more prestigious allied health staff also meet there - pharmacy and radiology most notably. It is easy to see that this provides a convenient opportunity to drop by the library.

The hospital has in the past three years developed internship and residency programs in many specialities of medicine. Recently, a LRN program has been added, necessitating the establishment of a small nursing library collection which is housed in one of the nursing school classrooms. Students may use the collection whenever the Director of Nursing Education is in the adjacent office (usually 8am - 5pm Monday-Friday) but other nurses may not use the collection, except by arrangement through

the medical librarian, acting as a intermediary between the Director of Nursing Education and the nurse. Selection, acquisition, processing and cataloging are done through the medical library, which maintains a union catalog of all holdings. The nursing collection is limited only to print materials, and these are allocated to the Nursing School budget. The librarian has built a limited nursing collection in the medical library.

The library provides standard services - routes, journals, circulates journals and books, provides reference services, annotated bibliographies and interlibrary loans. It has little non-print material although this may change as a new young Director of Medical Education has just been appointed. Anyhow, there is no room for A-V equipment in the library. Photocoping equipment is available in the Pathology Department, and the library staff may make use of that copier.

There has been a need expressed for expanding the present medical officers' quarters - particularly the lounge - and moving the library elsewhere. There is space that could be converted, by the tennis courts opposite Occupational Therapy, or extra space could be added to the outpatients clinic, presently under construction and scheduled to be completed in two years time.



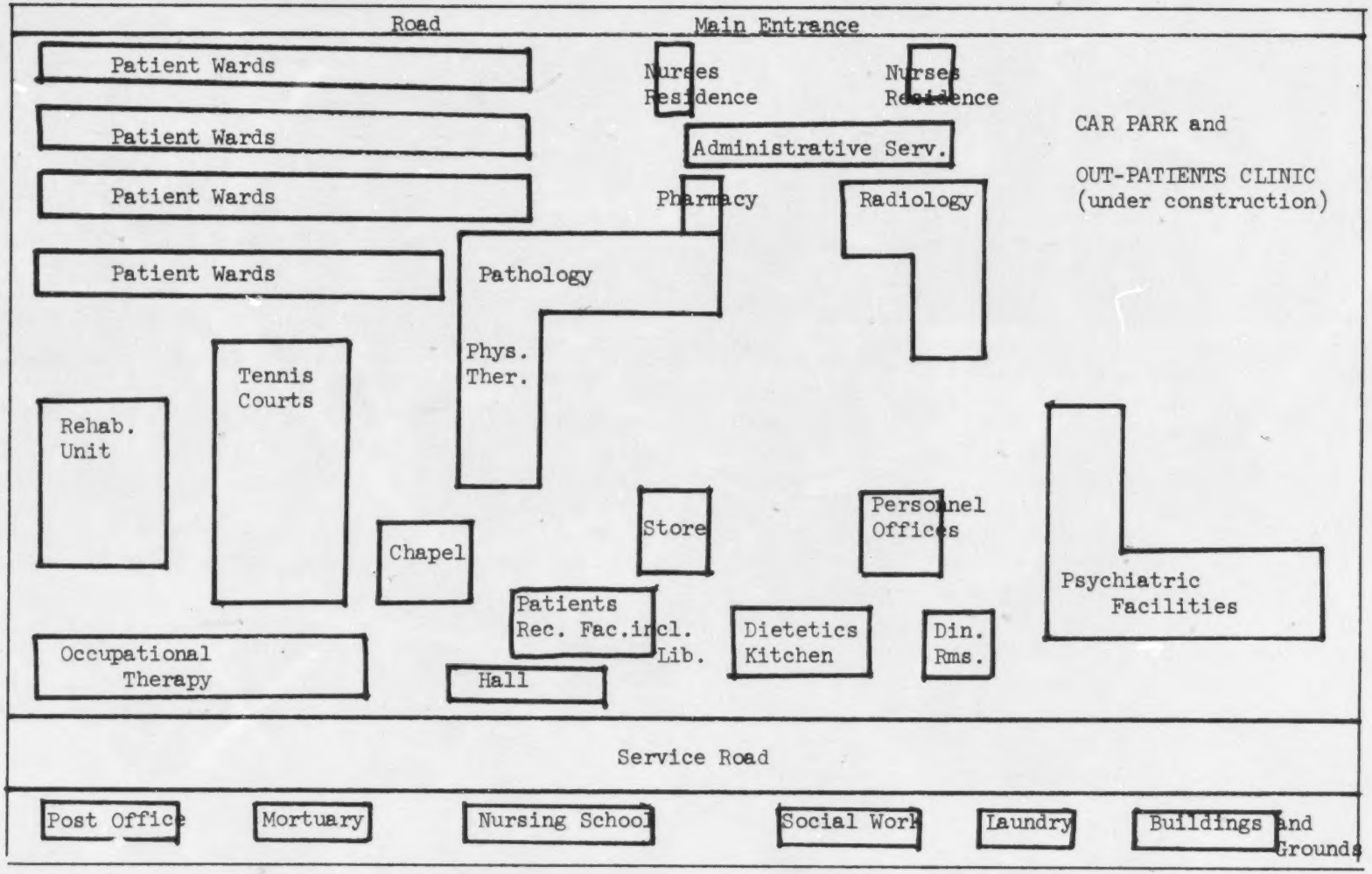
ADMINISTRATIVE SERVICES
(Second Floor)

Identify and discuss factors that might influence the decisions regarding the future of this medical library.

What are the alternatives available, and what consequences are associated with each possibility?

Keep in mind that a situation consists not only of the rational facts, but also includes political structure, political power, and individuals' attitudes and emotions, all in the content of a changing enviornment.

-- Courtesy of J.A. Virgo


Road
Main Entrance
Patient Wards
Patient Wards
Patient Wards
Patient Wards
Nurses Residence
Nurses Residence
Administrative Serv.
Pharmacy
Radiology
CAR PARK and
OUT-PATIENTS CLINIC
(under construction)
Pathology
Phys. Ther.
Tennis Courts
Rehab. Unit
Chapel
Store
Personnel Offices
Psychiatric Facilities
Patients Rec. Fac.incl. Lib.
Dietetics Kitchen
Din. Rms.
Occupational Therapy
Hall
Service Road
Post Office
Mortuary
Nursing School
Social Work
Laundry
Buildings and Grounds

Case Study
Job Descriptions
Library Committees

The Harkness Hospital's new research building provided new quarters for the Library. The library now contains approximately 25,000 volumes and receives 700 periodicals currently. The staff consists of three professionals, the Head Librarian, a Readers' Services Librarian (Reference and Circulation) and the Cataloger. There are six full and part-time supporting staff members. The new quarters have a capacity for 50,000 volumes. The research building was built to accommodate the increased research activities at the hospital, and the library, of course, must keep pace with the needs of its clientele.

To date, the Library Committee has made the selection of material to be added to the Library and has set a good many of the policies. This practice was in effect when there was no professional librarian in the library. When a professional librarian was hired as Head Librarian five years ago, the practice continued. Miss Mann, the Head Librarian, had to devote much of her time to planning the new quarters, projecting budgetary needs and writing reports and justifications for the addition of new staff members. She felt she should not and could not make all the changes she thought necessary all at once.

Now that the library is settled in the new quarters and a full staff complement is at hand, Miss Mann feels she should have a freer hand in selection and policy decisions. She would like to be able to make selections of obviously pertinent material, going to the Library Committee or other authorities for questionable or peripheral material. Miss Mann also believes that she knows the needs of all of her clientele and can best set policies as to hours, circulation regulations, services, etc. She would at least like to be able to make proposals and have a right to disagree with what the Library Committee thinks should be done. Because the Library Committee has performed these functions for so long, Miss Mann finds she is fighting a losing battle trying to convince them of her ideas. She feels that she cannot perform effectively under these conditions and asks the Administrator of the Hospital to call a meeting of the Library Committee, at which the Administrator and other members of the Administrative group of the Hospital would also be present.

You are to assume the role of Miss Mann, the Administrator of the Hospital, two members of his group and three Library Committee members. The following questions are suggested as a guide in enacting the above case study:

1. Should Miss Mann have acted sooner in trying to take over these functions from the Library Committee?

2. Could Miss Mann have handled this in a different way?

3. Was there something lacking in Miss Mann or the operation of the library which made the Library Committee reluctant to have Miss Mann take over the selection and making of policy decisions?

4. What is a Library Committee's function?

Reprinted from MLA Syllabus, "Human Factors in Medical Library Administration."

APPENDIX D

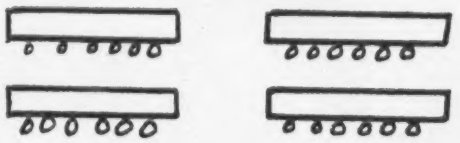
MEDICAL LIBRARY ASSOCIATION
Continuing Education Program

Name of Instructor _____
Title of Course _____
Date(s) Offered _____
Course Location _____

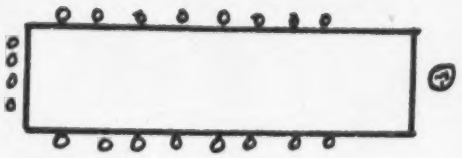
Please check the following items that are required to teach the above course.

TYPE OF ROOM SET-UP

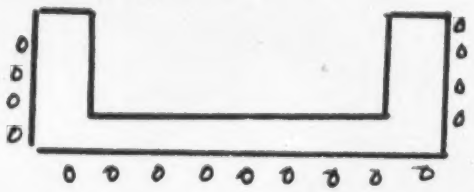
( ) Classroom



( ) Conference



( ) Hollow-U



( ) Theatre style

( ) Other - Please specify and diagram

TEACHING EQUIPMENT

( ) Instructor's table
( ) Podium
( ) Large blackboard
( ) Chalk
( ) Eraser
( ) Screen
( ) Flip chart
( ) Felt tip pens
( ) Masking tape
( ) Lantern slide projector ($3\frac{1}{4}$" x 4")
( ) Carousel slide projector
( ) Overhead transparency projector
( ) 16 mm motion picture projector
( ) Table for reference tools or equipment
( ) Other - Please specify
This includes all CE 16 equipment

TEACHING MATERIALS

( ) Reference tools
Please attach a separate sheet listing titles and number of copies
( ) Terminals (please specify models)
( ) Telephones

SHOULD YOU NEED ADDITIONAL EQUIPMENT, OR OTHER ITEMS NOT LISTED HERE, PLEASE SPECIFY.